

No Wrong Door System of Access to LTSS for all Populations and all Payers

Person Centered Planning

NWD Planning Grantees Monthly Webinar December 10, 2014, 3PM ET







Agenda

- 1. Welcome and Agenda Overview
- 2. Introduction to Person Centered Planning
 - Vision and Philosophy for Person Centered Planning
- 3. Learning From Peers
 - Virginia
 - North Carolina
 - Wisconsin
- 4. Next Steps and Closing







Reminders

- We want to capture your attendance—if you have others in the room with you, please send their name(s) or the total # of participants via WebEx's chat feature to Chris.Ragsdale@Lewin.com.
- Use WebEx's chat feature if you have questions for federal partners or for other states.
- Post-Webinar survey—we need your feedback!







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NWD System Vision

LTSS Family Members Schools Individuals Providers Non-Profits & Friends 1-800 #'s/211 Acute Care Systems VA Medical Center **Nursing Homes** Local I&R MFP/ Hospitals Veteran Directed Section Q Programs **HCBS** Confirming Need For/Interest in Person Centered Counseling Support Any Immediate LTSS Needs, Conducts Personal Interview and Identifies Goals, Strengths and Preferences Comprehensive review of private resources and informal supports Facilitates the development and implementation of the Person Centered Plan **Linking Individuals to Private Pay Resources** Helps individuals connect to services that will be covered out of pocket or through other community resources **Preliminary Functional Eligibility Preliminary Financial Eligibility Assessment for Public Programs: Assessment for Public Programs:** Collects any additional functional Supports the individual in submitting data needed for public programs applications for public programs including, if appropriate, Medicaid including, if appropriate, Medicaid **Final Determination of Functional Final Determination of Financial Eligibility for Public Programs: Eligibility for Public Programs:** Completes the process that officially Completes the process that officially determines that individuals are determines that individuals are eligible for public programs eligible for public programs Follow-up Ensures the plan's services are initiated, meets the needs of the individual and is adjusted as needed.

Streamlined Access to Public Programs

Public Outreach and

Links to Kev

Referral Sources

Person Centered Counseling

Governance and Administration of the NWD System State Oversight, Management and Financing of the NWD System

Must include State Medicaid Agency, State Agencies Administering programs for Aging,
Intellectual and Developmental Disabilities, Physical Disabilities and
Mental/Behavioral Health needs.

Administration includes input from external stakeholders, including consumers and their advocates, on the design, implementation and on-going operations of the system

MIS tracks clients, services, outcomes, expenditures and organizational performance, enables information to flow with client from initial person centered plan through follow-up, and supports on-going evaluation and continuous quality improvement







State Governance and Administration

Public Outreach and Coordination with Key Referral Sources

NWD System Functions

Person Centered Counseling

Streamlined Access to Public LTSS Programs







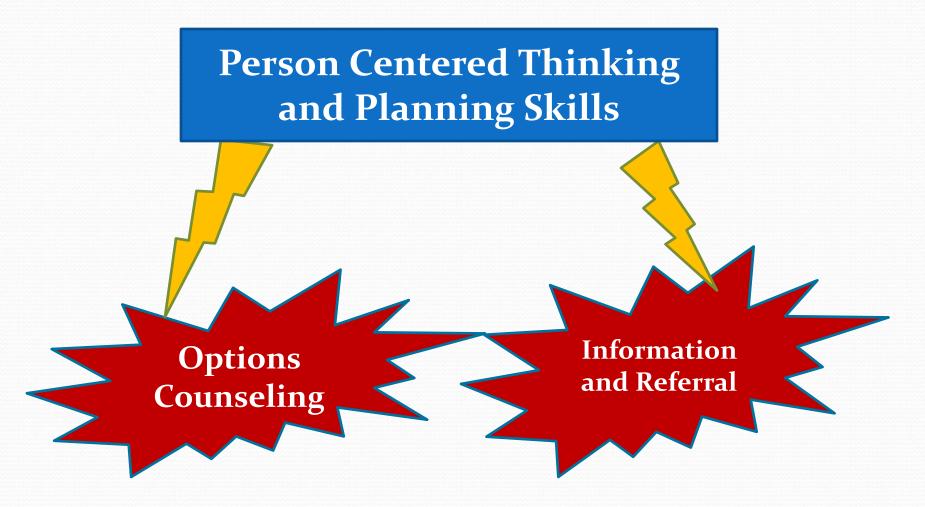








How Does PCC interact with....



Confirms Need For/Interest in Person Centered Counseling Support Any Immediate LTSS Needs, Conducts Personal Interview and Identifies Strengths and Preferences

Person-

Centered

Counseling

Functions

Conducts comprehensive review of private resources, informal caregiver supports and screening for Public Programs

Facilitates the development and implementation of the Person Centered Plan

Specialties

Facilitates Transitions:
Hospital Based Transition, Institutional
Transition & Youth Transition, etc.

Serves Unique Populations:
Individuals with Physical Disabilities,
Seniors, Individuals with
Intellectual/Developmental Disabilities or
Alzheimer's Disease/Dementia, etc.

Links Individuals to Private Pay Resources

Helps individuals connect to services that will be covered out of pocket or through other community resources

Assists Individuals in Applying for LTSS Public Programs

Uses information from the person centered plan and any additional information as needed to help individuals apply for LTSS public program(s) relevant to person centered plan and helps individuals navigate through the entire eligibility process.

Preliminary Functional Eligibility Assessment for Public Programs

Final Determination of Functional Eligibility for Public Programs Preliminary Financial Eligibility
Assessment for Public Programs

Final Determination of Financial Eligibility for Public Programs

Follow-up

Ensures services are activated, are meeting the needs of the individual and adjusted as necessary

- Core Training: Required of all Person-Centered Counselors
 - Specialties: Duties to be performed by subsets of Counselors with specialized knowledge and experience

 Duties that can be assigned to Person-Centered Counselors

at the discretion of the State

The Foundation of Person-Centered Practices

- Historical
 - Carl Rogers
 - Judith Snow
 - John O'Brien, Michael Smull, Beth Mount, Jack Pearpoint, Tom Nerney
- It's about finding and supporting balance ~ between what matters to the person ("important to") and the things that help the person be safe and healthy in a way that works for him/her, and be a welcome member of his/her community ("important for")
- It is about engaging the person to be recognized as the expert on his/her life and be supported to be in control of his/her life, with the supports needed to do so

The concept of Important To and Important For comes from The Learning Community for Person Centered Practices © 2012



It's more than choice

- Sequence matters; we must understand what is "important to" someone before we can support "important for"
- Good person centered practices always address
 - Important to
 - Important for
 - Necessary clinical elements of support
- It is not about "either happy OR healthy and safe";
 - It is about "both-and"**

**With thanks to Mary Lou Bourne



It always starts with listening....(and we often don't get it right the first time)

- Listening to words
- Listening to actions
- Listening to what others may describe as "behaviors of concern"
- Supporting AND minimizing risk at the same time

 Barbara's story ~ Talking a walk is better than Ativan









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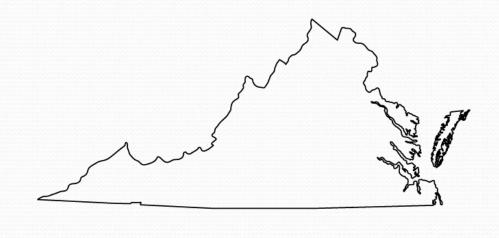






Virginia

Tera Yoder
Dawn Machonis
Partnership for People with
Disabilities (UCEDD)
Virginia Commonwealth
University



Katie Roeper
Virginia Department for
Aging and Rehabilitative
Services

Person-Centered Practices in Virginia

Person Centered Practices (PCP) definition

Practices that focus on the preferences and needs of the individual, empower and support the individual in defining the direction for his or her life, and promote self-determination, community involvement, contributing to society and emotional, physical and spiritual health (OC Standards Definition)

Why Virginia values & supports PCP

- It's what people want; practices are successful in supporting people
- General Assembly established it as policy
- Is an important element in state and national guidance

Process in Virginia

- Early work and Rebalancing initiative
- Becoming a PC organization project
- Systems Transformation Grant
- Options Counseling- standards/certification

Person-Centered Practices in Virginia

- Where Virginia is now
 - Va PCP planning group
 - Training/Coaching
 - Mentors/Trainers
 - Skills based
 - Website www.personcenteredpractices.org

Partnering with a UCEDD



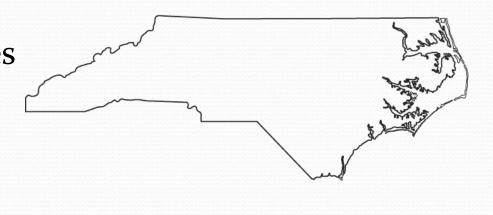




North Carolina

Chris Howell

Developmental Disabilities
Training Institute &
Center for Aging and
Research Educational
Services



UNC Jordan Institute for Families







Why is PC Planning Important?

- Problems we are trying to solve are adaptive, complex, and ever changing
- Person-Centered approaches allow us to use principles and foundational approaches in a flexible way to reach people where they are and provide more adaptive solutions to human problems
- Person-Centered approaches remind us that it is the impact and outcomes that should drive interventions – always.
- Person-Centered approaches are broad and highly applicable and malleable to population and context.







How have we used it?

- Options Counseling (ARDC) training and implementation
- Transitions to Community Living
- No Wrong Door
- Other places it is talked about and taught:
 - **►** Students
 - ► Leadership Training
 - ► Training for social services and aging networks
 - ► Person Centered Thinking (2 day offerings)







What has been the impact?

- Among organizations participating in the "Building a Person-Centered Organization" project:
- Organizations showed improvement responsiveness to family and consumer input
- All organizations showed improvement in incorporating meaningful activity around consumers' tastes and wishes.
- Review of service plans before and after implementation showed significant improvement in incorporating information about the involvement of family with the client/patient/resident as well as statements about the client's strengths and positive reputation (e.g., "has a quick wit" or "likes to help people");







What are we proudest of?

- Collaborative efforts
- Building capacity
 - ► Trainers/Mentors
 - ▶ Organizations who seek it out
 - ► Technical Assistance
- Cross Systems approach: I/DD and Aging helps to build collective impact



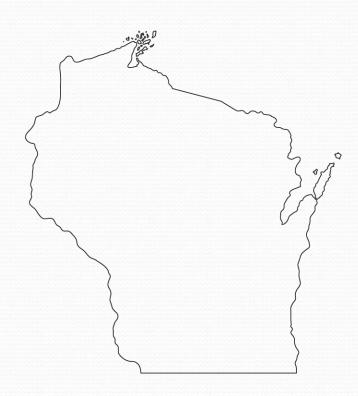




Wisconsin

Maurine Strickland

Wisconsin Department of Health Services



Wisconsin Aging and Disability Resource Centers



- Statistics Wisconsin
 - Population Estimate 2010
 - 5,686,986
 - 41 Aging and Disability Resource Centers (ADRC)
 - ADRC Contacts
 - 484,290 (2013)



Options Counseling Process

- Common flow of conversations
 - Welcome
 - Discovery
 - Researching Options
 - Decision Support
 - Next Steps







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ADRC Technical Assistance Exchange: Planning Grantees Webpage

- Resource from other states
- Resources from federal partners
 - ► More forthcoming!
- Webinar recordings and materials

ADRC-TAE.acl.gov/tiki-index.php?page=PlanningGrants







Monthly Webinars

Second Wednesday of Every Month at 3PM EST Mark Your Calendars!

Month	Topic
January	No Webinar—Reporting Section Due
February	NWD System Management Tool and Needs Assessment
March	Continuous Quality Improvement







Next Steps

- Key Dates to Keep in Mind
 - ► Grantee Webinars
 - 2nd Wednesday of each month at 3PM
 - ► Reporting Deliverable Due Dates
 - January (Stakeholder Engagement NWD Vision/Mission)
 - April
 - September
- Reach out to project officers and Lewin technical assistance leads if you need further support or have questions
- Post-Webinar Survey!